Website Management Procedures

Purpose
In July 2010 the Department launched a new agency website. The site will be developed, maintained and hosted by New Mexico Interactive (NMI). All content on the website is the responsibility of TRD, but changes to the site's functionality must be made by the webmaster at NMI.

TRD will use SharePoint to allow the Department's staff the ability to make website changes directly. Procedures are needed to monitor the website for the purpose of keeping information accurate and current. This document defines those procedures.

Responsibility of Content Contributors
Each Content Contributor will be responsible for monitoring the accuracy and currency of their business area on the website and making recommendations for changes, keeping in mind the needs of their business unit.

Content Contributors are responsible for:
- Contributing website content such as, documents, reports, web pages and data for which they are subject matter experts or for which their business unit is responsible
- Periodically reviewing content for which they are responsible, editing, adding to or replacing it to keep it current, accurate, and reliable
- Coordinating preparation of content for publication using existing business processes (this will differ by business area)
- Ensuring that all necessary reviews and approvals for changes have been received before submitting content for publication (this will differ by business area – but may require up to Division Director review/approval)
- Ensuring the Department's Website Style Guide and Website File Naming Conventions are applied in the content management process

Content Contributors are responsible for receiving and addressing content edits received from any individual within the business unit they represent as indicated in the table below. Edits implemented by a content contributor may include changes to a web page, reusable content, list or file that is:
- Inaccurate
- Outdated
- Not clear
- Missing vital information
- Misspelled or grammatically incorrect
- Working incorrectly (including broken or incorrect hyperlinks)
- Displaying incorrectly
- Newly developed

All edits requested of a Content Contributor should be documented in writing.

Content Contributors are:

Business Unit	Name	Title
Revenue Processing Division	Rose Romero	Management Analyst
Audit and Compliance Division	Don Garcia	Tax Examiner

Business Unit	Name	Title
Audit and Compliance Division	Peggy Dominguez	Audit Supervisor
Audit and Compliance Division	Teri Gallegos	Administrator
Property Tax Division	Roy Sandoval	In House Title Examiner Supervisor
Property Tax Division	Tyra Sandoval	Appraisal Bureau Supervisor
Tax Fraud Investigations Division	Estevan Baca	Internal Auditor
Administrative Services Division	Anna Salazar	Accountant
Administrative Services Division	Renee Sandoval	Financial Supervisor
Information Technology Division	Robert Martinez	Application Developer
Information Technology Division	Santiago Roybal	Application Developer
Tax Information and Policy	Alicia Romero	Public Relations Specialist
Tax Information and Policy	Carl Twibell	Public Relations Specialist
Tax Information and Policy	Tracy Wright	Public Relations Specialist/Editor-in-Chief
Tax Information and Policy	Patricia Herrera	Tax Information and Policy Supervisor
Motor Vehicle Division	Mac Lewis	Senior Management Analyst

Responsibility of the Editor-in-Chief

All substantive changes to a web page will be reviewed by the site's Editor-in-Chief, Tracy Wright. The Editor-in Chief is responsible for:
- Ensuring quality and consistency of content
- Ensuring accuracy of information, either by direct review or by coordinating the content review by subject matter experts
- Appling the Website Style Guide and ensures that language, style and format contribute to usability and readability standards
- Systematically reviewing content and edits or replacing it to keep it current, accurate and reliable

Responsibility of the Website Manager

The primary function of a website manager is to review and approve site changes according to the Department's guidelines and to ensure content is kept current and accurate. Website Managers are responsible for:
- Tracking the approval of content submitted by Content Contributors
- Periodically and systematically reviewing content and edits or replacing it to keep it current, accurate and reliable
- Ensuring the Department's web site style guide and naming conventions are applied in the content management process
- Coordinating content review/edit procedures with the Editor-in-Chief
- Providing final review/approval prior to content being published
- Monitoring statistics on site usage

Website Managers are:

Business Unit	Name	Title
Revenue Processing Division	Miriam Pino	Imaging Systems Administrator
Office of the Secretary	Marlena Taylor	Special Projects Coordinator
Tax year configuration changes	Santiago Roybal	Application Developer

Responsibility of the E-Government Officer
The E-Government Officer will be responsible for developing and delivering an E-Government Strategic Plan, coordinating Executive Management staff review of proposed enhancements and presenting approved enhancements to NMI. Approved enhancements will be documented through a Scope of Work signed by representatives of NMI and the Department.

The E-Government Officer is responsible for:
- Proposing of strategic uses of the Department's online presence to accomplish agency goals and objectives, assist the Department to operate more effectively and efficiently, reduce the cost of providing government services and deliver improved services to citizens
- Providing oversight of the Department's websites' functionality and design
- Managing the process for creating and clearing content
- Tracking the approval of content submitted by Content Contributors
- Developing a schedule for updating website content
- Periodically and systematically reviewing content and edits or replacing it to keep it current, accurate and reliable
- Developing and coordinating the web page copy edit process
- Ensuring the Department's web site style guide and naming conventions are applied in the content management process
- Providing final review prior to content being published
- Monitoring statistics on site usage
- Conducting periodic user testing of the website
- Making recommendation for changes to increase usability and accessibility
- Assisting with internet marketing efforts
- Managing the continual development of features
- Creating and executing project plans for new features
- Keeping current with technology that can be used to assist with e-government services

Monthly meetings of the Website Steering Committee will be planned, coordinated and chaired by the E-Government Officer.

Consultation and advisory assistance pertaining to online information and services will be provided by the E-Government Officer to the Website Steering Committee and the Department's Executive Management staff.

Responsibility of New Mexico Interactive (NMI)
NMI will actively participate in TRD Website Committee meetings as the operator of the website. Requests for changes (not enhancements) that cannot be completed by the Content Managers will be

sent to NMI from a Website Manager through NMI's project management software, Daptiv. NMI will post changes requested through Daptiv according to the following schedule of priority:

Priority	Posted within
Critical	4 hours
High	2 days
Medium	7 days
Low	30 days

For enhancements to the website, such requests will be mutually agreed as to scope and schedule on a case by case basis and be deployed in a controlled production schedule.

Procedure for Changes to Existing Content
Content changes include edits to web pages, lists or documents that are:
- Inaccurate
- Outdated
- Not clear
- Missing vital information
- Misspelled or grammatically incorrect
- Working incorrectly
- Displaying incorrectly
- Newly developed

Content changes may originate from any Department employee. Such changes should be submitted to a Content Contributor in writing.

Content Contributors may be asked to implement content changes as the result of an annual or other regular information update process such as, revised forms and publications. Content Contributors are may be asked to coordinate the review, approval and preparation of content for publication using existing business processes.

Proposing and Evaluating Content Changes
The Department's staff seeking changes to the site should complete the change form and send it to the Content Contributor(s) representing their respective business unit. The Content Contributor will evaluate the request, determine if management approval is needed and obtain it and designate the urgency of the request.

If management approval is not necessary, the designated content contributor implements content changes according the User Guide developed by NMI.

If management approval is necessary, the designated content Contributor Coordinates the review, approval and preparation of content for publication using existing business processes.

Initiating Changes
Content changes that can be made by a Content Contributor include edits and revisions to:
- Web page content
- Reusable content
- Lists

- Files within Site Collection Document libraries

All edits submitted to a content contributor should be in writing. Content Contributors edit content using SharePoint. Please refer to the User Guide developed by NMI for specific steps needed update to a web page, list or file.

All documents are maintained within the Site Collection Document library. File naming conventions specified in the Website File Naming Convention and Meta Data Guide should be applied when uploading new documents or revising existing documents.

Content contributors shall ensure the Website Style Guide has been followed prior to submitting content changes in SharePoint.

Changes beyond a Content Contributor's permissions
Changes for which the Content Contributor does not have SharePoint permission to make will be submitted by Content Contributors to a Website Manager using the Website Change Form. Changes that cannot be made by a Content Contributor include:
- Updates to the homepage
- The order of items displayed in an application containing information such as, forms, publications, Decisions and Orders, rulings, tax calendar dates and NM County map data
- Web page titles
- Information displayed on the left hand navigation bar
- Information displayed on the navigation bar located at the top of the website
- Information in the "Contact Us" email application
- Updates to the Department's organizational chart

Changes beyond a Content Contributor's permissions will be submitted to NMI using Daptiv, NMI's project management software. NMI will implement such changes according to the schedule of priority requested by the Site Manager. An automated notification is sent from Daptiv to the Site Manger once an issue is completed. The Site Manager is responsible for verifying issues are completed.

Approving/Publishing Changes
All Website Managers and the initiating Content Contributor receive an email notification once a "Major Version of a document, list item or web page has been submitted for approval/publication. A designated Website Manager will approve/reject the change within 24 hours. Reasons for rejected changes are documented using the comments field in SharePoint.

Substantive changes to web page content are sent to the Editor-in-Chief for editing. The Editor in Chief works with subject matter experts and the Department's Legal Services Bureau to ensure content is accurate, clear and consistent with the Website Style Guide. Any substantive changes proposed by the Editor-in-Chief must be reviewed by management staff representing the subject matter being reviewed and a representative from the Department's Legal Services Bureau.

Website Managers review site changes to ensure hyperlinks work correctly, data within the Site Collection Document library or lists are correct and web pages are consistent with the Department's Website Style Guide.

Once a change has been approved, all Website Managers and the initiating Content Contributor receive an email notification indicating the requested change has been approved.

Procedure for Changes to Administrative Functions

Changes can be made by NMI or Website Managers that impact how the Content Managers edit content. Website Managers seeking to make changes to administrative functions of the site will coordinate such changes with NMI and notify content managers prior to making changes. NMI will make changes requested by the Department in writing according to mutually agreed upon schedule.

Procedure for Enhancements to the Website

Website enhancements are new features, applications or expanded bodies of information but do not include updating files within the Site Collection Document library. Enhancements are more expansive than content changes.

A Website Steering Committee comprised of a single representative from each business unit will be established to provide strategic direction for the Department's online presence. The Website Steering Committee will identify bodies of knowledge and applications that should be expanded online. Such enhancements will be approved by the Department's Executive Management team.

Members of the Department's Executive Management staff will negotiate implementation of enhancements with NMI. Enhancements that are adopted for implementation by the Department's Executive staff and NMI will be agreed to in writing for deployment at a mutually agreed date.

Website Steering Committee Members are:

Division	Name	Title
Revenue Processing Division	Ron Cruz	Deputy Division Director
Audit and Compliance Division	Wayne Glazener	District A Bureau Chief
Property Tax Division	Roy Sandoval	In House Title Examiner Supervisor
Tax Fraud Investigations Division	Estevan Baca	Internal Auditor
Administrative Services Division	Joann Chavez	Financial Distributions Bureau Chief
Information Technology Division	Joel Matek	Chief Information Officer
Office of the Secretary	Patricia Herrera	Office of Tax Policy Manager
Office of the Secretary	Marilyn Hill	Deputy Cabinet Secretary
Motor Vehicle Division	Adam Diamond	Special Projects Manager

All users of the Department's websites, including Content Contributors, may submit a proposal for enhancements to the sites including, the addition of new content and features. Proposals should be made in writing using a One Page Business Case form to a designated member of the Website Steering Committee.